Carmichael.

Behaviours of an Effective Charity Trustee[1]

Improving Boardroom behaviours

19 Board Behaviours for effective governance

- Committed to the cause
- Clarity of focus (understanding role and purpose)
- Being strategic
- Leads by example
- Team player
- Integrity
- Ethical
- Independent thinker
- Probing (not controlling)
- Risk aware (not averse)
- Self-aware
- Creative (innovative)
- Keen to learn and improve
- Open-minded
- Courageous
- Inclusive
- Good listener
- Inspires trust
- Takes (and accepts) responsibility

An Effective Charity Trustee will:

- Dedicate sufficient time to being a trustee
- Spend time better understanding all aspects of the charity's activities, including its history and goals
- Come prepared for meetings and contribute meaningfully
- Seek excellence in pursuit of the charitable objects
- Make decisions in the best interests of the charitable purposes
- Act in accordance with legal and constitutional powers
- Be able to articulate their legal and ethical duties to different audiences
- Take a strong position in promoting good governance in the charity
- Ensure governance structures are fit for purpose
- Recognise that the board needs to think differently in order to deliver stated objects and improve society
- Think about emerging trends, external/environmental developments and other factors that could impact the aims of the charity
- Focus questions and comments on how the charity delivers its aims
- Ask more strategic than operational questions

An Effective Charity Trustee will:

- Place the client/beneficiary group at the centre of decisions
- Review the charity from all relevant perspectives and see its sustainability and impact from a range of stakeholder views
- Behave in a professional manner
- Demonstrate a passion for their work and care about the people in the charity
- Live the values of the charity
- Speak to the widest range of people with an interest in the work of the charity
- Use appropriate and respectful language and behaviour
- Accept that not everyone will share the same views
- Make an effort to build effective relationships within and outside the boardroom
- Work collaboratively
- Support and challenge the CEO/Senior Management Team (SMT)
- Act in accordance with the charity's stated values and culture
- Consider the importance of creating a safe and welcoming environment for all who come into contact with the charity
- Will be aware of any power dynamics arising from their role as a trustee and take steps to ensure that authority is not misused

An Effective Charity Trustee will:

- Avoid any behaviour that may tarnish the reputation of the charity
- Declare any real or perceived conflicts of interest
- Respect the confidentiality of matters discussed in a board meeting and elsewhere
- Make decisions that are in the best interest of current and future beneficiaries
- Act fairly, transparently and consistently
- Maintain high ethical standards in all areas of trusteeship
- Take action against illegal or immoral behaviours
- Put the interests of all beneficiaries at the centre of decision making
- Observe their safeguarding responsibilities to stakeholders
- Put effort into building and maintaining a reputation amongst stakeholders for being honest and trustworthy
- Challenge established thinking and may even play 'devil's advocate' when required to improve decision making
- Ask questions to understand data and differing opinions
- Decide and take action by applying intuition, experience and judgement to the data available

An Effective Charity Trustee will:

- Speak up if they have any continuing concerns
- Question if the right data is being collected and presented in order for the board to monitor progress
- Assimilate various and conflicting information and opinions into a well-considered decision
- Seek evidence to support what is being reported by the CEO/SMT
- Ask questions of the CEO/SMT to check and challenge progress against strategic aims
- Empower staff to enact board decisions
- Challenge constructively and provide robust scrutiny based on data and material information
- Seek assurance and not blindly accept reassurances
- Request information in different formats if it will assist in decision making
- Use a range of data to challenge the assumptions and assertions of the CEO/SMT
- Think about how a proposal will positively impact on the charity's beneficiaries
- Be up-to-date with the risk register
- Proactively identify potential threats and opportunities
- Balance the risk of lost opportunities and cumulative risks

An Effective Charity Trustee will:

- Recognise that generating greater impact for clients/beneficiaries may require taking greater risks
- Use sound judgement to assess when to have the courage to take action where outcomes are uncertain but potential rewards great
- Recognise that decisions often need to be made based on incomplete information
- Reflect on, and seek feedback from a wide range of people on their performance and act on it
- Appreciate other trustees' strengths and how they complement their own
- Ask for advice and support when needed
- Participate in the board's self-evaluation exercises
- Recognise their own behaviours and how they can affect those around them
- Be curious, confident and modest
- Read others' reactions and adjust behaviours/language accordingly
- Embrace change and new ways of working
- Encourage creative actions to mitigate risks or overcome challenges
- Welcome different approaches to problem solving
- Champion equality and diversity, in all its forms

An Effective Charity Trustee will:

- Recognise diversity as an important value and will work to develop and contribute to develop a diverse team
- Embrace diversity of thinking, experience and perspective to make the best decision for the charity
- Promote different opinions and points of view even when it challenges the consensus
- Raise difficult issues in a brave and respectful manner
- Seek to overcome setbacks and challenges facing the board and the charity
- Take bold action when the anticipated outcomes are believed to be right
- Confront problems directly and face adversity head on
- Be comfortable in making unpopular decisions, if believed to be in the best interest of the charity's beneficiaries/clients
- Publicly support board decisions, especially after speaking against a proposal
- Create a welcoming atmosphere for new and existing trustees
- Support trustees and others attending board meetings to fully contribute to board decision making processes
- Value different experiences and perspectives.

An Effective Charity Trustee will:

- Work to remove or reduce barriers preventing people from fully contributing to the work of the charity
- Seek out divergent voices in order to understand the strengths and weaknesses of the charity
- Take the views of all stakeholders into consideration when making decisions
- Use different communication styles with different stakeholder groups
- Value the different priorities and experiences of stakeholders
- Reflect on the feedback received from all areas of the charity
- Do what they said they would
- Deliver on what they promised
- Promote two-way communications with various stakeholders
- Share good practice with other organisations
- Act as an ambassador for the charity
- Provide timely and concise information to others
- Consistently meet commitments to the charity and stakeholders
- Determinedly pursue the achievement of charitable objects

An Effective Charity Trustee will:

- Quickly translate charity requirements into actions by defining 'who does what, by when' and monitoring the implementation of plans
- Place safeguarding matters at a premium
- Publicly support board decisions, especially after speaking against a proposal
- Welcome challenge from inside and outside of the boardroom
- Accept collective responsibility
- Know when it is time to move on.